

EXHIBITOR LEAD RETRIEVAL **GUIDE**



informa markets



#PharmapackEU



Step 1

Access Visit Lead Retrieval Tool

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Step 2

Scan a visitor badge

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Step 3

Retrieve Leads

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Exhibitor Lead Retrieval Guide

Get the most out of Pharmapack by using the lead retrieval tool provided by our registration partner Visit Connect.

Every exhibiting company has a main point of contact who has access to the Visit Connect Portal, where they can complete their team members' registration and manage the lead retrieval tool.

Benefits of Visit Connect lead retrieval

- Scan the QR codes on visitors and exhibitors badges and record their details
- Optional: Set questions, which can be answered & recorded during the interaction
- Optional: Attach text notes, images and voice memos to potential leads
- Review the data post event

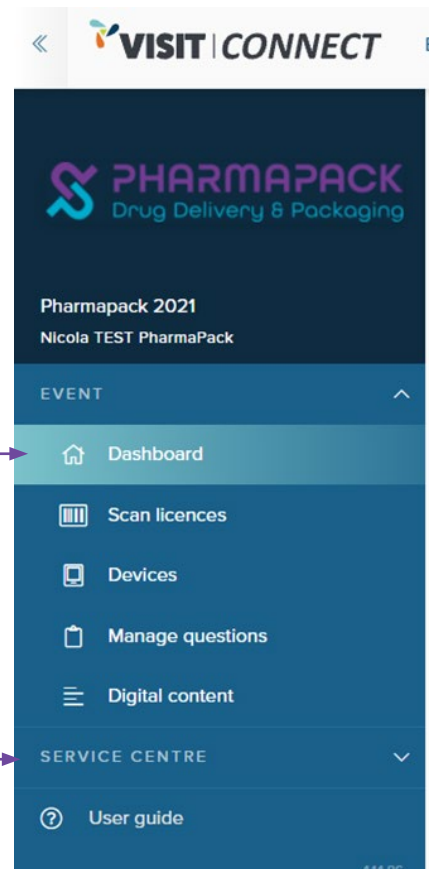
Visit Connect Portal

Once logged in to Visit Connect, in the left-side menu under **EVENT**, you will find the following options:

- **Dashboard** – View a list of your events and see lead collection statistics
- **Manage questions** – View and configure your (custom) questions

Under **SERVICE CENTRE** you will find:

- **Stand personnel** – View, register, import, export, delete, and send scan licenses to your stand personnel
- **Leads** – View, filter and export leads collected



Creating Questions (Optional)

Exhibitors can add questions for their leads to answer, which they can set up under **Manage Questions**.

By tailoring your questions to your customers and business needs, your post-event follow-up will be more effective.

Example questions:

- What is your buying cycle?
- What is your preferred method of contact?
- When are you looking to place an order?
- What is your purchasing authority?
- Who is your current supplier for ... ?

NOTE: The type of answer can be changed from this drop-down menu to include free text, multiple choice or single choice.

It is recommended to have 10 questions maximum and rank them by importance for ease of asking the questions to the potential lead

VISIT | CONNECT Event > Manage questions

Start tour

Pharmapack 2021
Nicola TEST PharmaPack

EVENT

- Dashboard
- Scan licences
- Devices
- Manage questions
- Digital content

SERVICE CENTRE

- User guide

4.94.86

Add a question by using the add button below, or click to edit a question. OK

QUESTION NAME

Field is required

TYPE
Multiple choice

Enabled

Answers:

ANSWER NAME

Close Add Save

+ Add

1. Click on **Manage Questions**

2. Click on **+Add**

3. Add the question

Onsite staff - accessing the lead retrieval tool & scanning a lead

The Information of a visitor (which could be a potential lead) is shared when the exhibitor scans their digital badge. The scanning is done through Visit Connect and this can be accessed 2 ways:

1. There is a button on the homepage of the Pharmapack app called **My Badge & Lead Retrieval**. Once you click on this button it will re-direct you to Visit Connect.
2. If you don't download the Pharmapack App, you can also access Visit Connect by a link that will be emailed to exhibitors before the event.

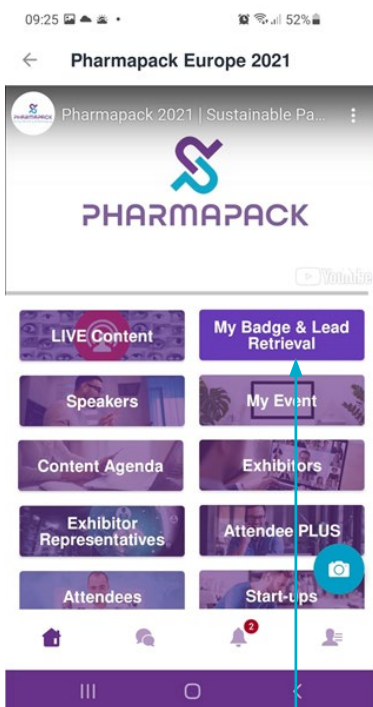


Once you access Visit Connect, please follow the steps below:

1. Tap the **Add lead** button in the top-right corner of your screen
2. Allow the app to use the camera on your device
3. Scan the QR code on the visitor's badge
4. When the scan succeeds, your device may vibrate or make a sound, depending on the device settings

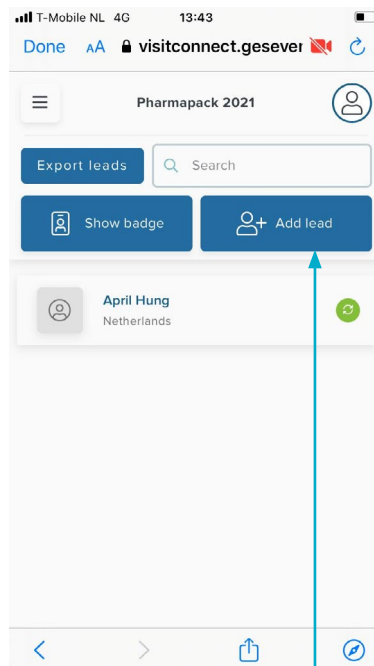
If the scan fails, you can manually enter the visitor's 15-character code on the **Enter code** tab. This code is three groups of five letters printed on the badge.

PHARMAPACK APP



Visit Connect

SCAN A LEAD



Add leads button

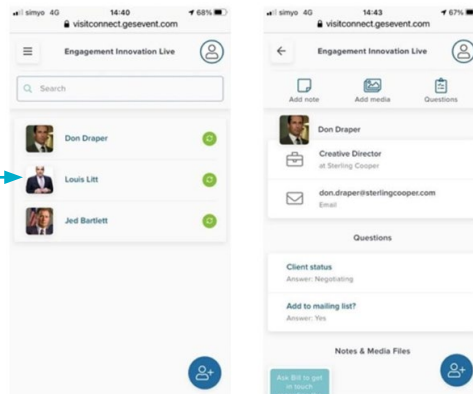
EXAMPLE OF A BADGE



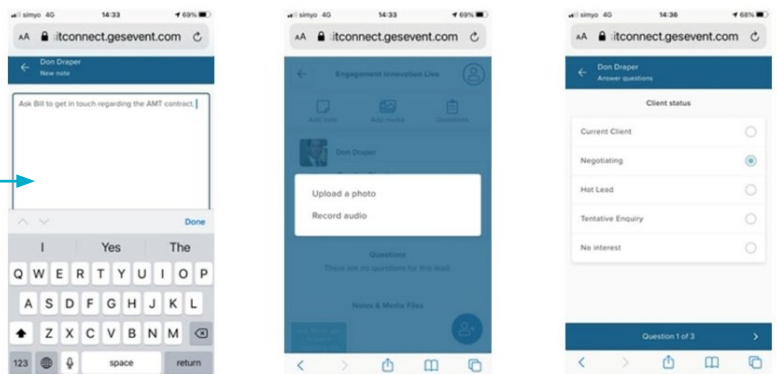
15-character code

Collect & Review leads

In the main screen of Visit Connect, you can see a list of all the leads collected. Tap on one to see the details, and you can continue to annotate after the visitor has left.



Optional: After adding the lead, you can enter answers to questions which were setup pre-event and attach memos, images or notes.



Retrieving your lead data

Visit Connect app: Perform a manual sync

Your leads should automatically synchronise to the visit connect portal. If the sync icon is red, it means the information has not fed through. Please follow the steps below to ensure that all data is saved to the portal

- Connect your device to the internet (be online) and open the Visit Connect app
- Go to the **Leads** page and swipe down to start synchronising your leads
- Wait until you see the message “All leads are synchronised”, then close the app
- Log in to your Visit Connect account in the web portal ([https:// visit.gesevent.com/](https://visit.gesevent.com/)) and verify that all the leads are visible and have been synchronized



Reviewing your lead data

Within the Visit Connect portal (<https://visit.gesevent.com/>) you can review all the scanned leads.

Click **Leads** in **Service Centre** in the side menu to see a list of all the leads that have been collected during the event

NOTE: If you click on a lead and select edit, you will see more details. You can also print out the information collected about that specific lead. This way, you have the most important information on hand when you follow up on a lead.

Search for a lead or filter

Update the list with the latest information by clicking REFRESH LEADS (if the event is still going on).

Click on a lead and select edit to view more details

Export the leads in any format (excel, csv) by clicking EXPORT (see **Export leads**)

Full name	Company	Email	Scanned by	Scan time
April Hung	Informa Markets	vh@gmail.com	Staff / Barcode / April Hung's mobile	10/6/2021, 12:42:51 PM

Total no. of leads matching your search criteria 1

Export all leads

Accessing details from a lead

Once you click on a lead and select edit, there will be six tabs at the top of the page that let you see various things:

CONTACT – View and edit the lead's contact details

STAGES – See or choose which stage the lead is in, such as Contacted, Active Opportunity or Long-Term Opportunity. You can use this tab to build up a contact history for the lead

CONTENT - This lets you see the content collected by the lead

REGISTRATION QUESTIONS – View and edit the answers the lead entered on their event registration form

NOTES – View and edit the notes recorded for this lead or add new notes

Only available if questions are set:

YOUR QUESTIONS – View and edit the answers that the lead gave to your (custom) questions

